

REQUEST FOR PROPOSALS (RFP)

Issue Date: November 2, 2022

RFP# 301-23-021

Title: Marketing Services for the Virginia Spirits Board

Commodity Codes: 91876 (Marketing Consulting)

Issuing Agency: Commonwealth of Virginia
Virginia Department of Agriculture and Consumer Services
Procurement Office
102 Governor Street, Rm. 240
Richmond, VA 23219

Initial Period of Contract: February 1, 2023 through June 30, 2024 (with four one-year optional renewals)

Sealed proposals will be received until 2:00 pm, EST on Friday, December 9, 2022, for furnishing the goods/services described herein. All inquiries for information must be submitted in writing, via email, to:

Kevin Steinbrecher, CPPB, VCO, VCM
Director, Procurement and Support Services
Telephone: 804-225-4887
Fax: 804-371-8372
Email: Kevin.steinbrecher@vdacs.virginia.gov

If proposals are mailed or hand-delivered to the Issuing Agency, use the address shown above. Electronic proposals are not allowed and cannot be accepted.

OPTIONAL PREPROPOSAL CONFERENCE: A teleconference will be held on **November 10, 2022 at 11:00 a.m.** (Reference: Section VII.H. for the details on joining the conference).

In compliance with this Request For Proposals (RFP) and all conditions imposed in this RFP, the undersigned firm hereby offers and agrees to furnish all goods and services in accordance with the attached signed proposal or as mutually agreed upon by subsequent negotiation, and the undersigned firm hereby certifies that all information provided below and in any schedule attached hereto is true, correct, and complete.

Name and Address of Firm:

_____	Date: _____
_____	By: _____
_____	(Signature in Ink)
_____	Name: _____
_____	(Please Print)
_____ Zip Code _____	Title: _____
eVA Vendor ID or DUNS #. _____	Phone: (____) _____
E-mail: _____	Fax: (____) _____

Note: This public body does not discriminate against faith-based organizations in accordance with the *Code of Virginia*, § 2.2-4343.1 or against a bidder or offeror because of race, religion, color, sex, national origin, age, disability, sexual orientation, gender identity, political affiliation, or veteran status or any other basis prohibited by state law relating to discrimination in employment. Faith-based organizations may request that the issuing agency not include subparagraph 1.e in General Terms and Condition C. Such a request shall be in writing and explain why an exception should be made in that invitation to bid or request for proposal.

RETURN ALL PAGES ALONG WITH YOUR ORIGINAL PROPOSAL (Tab 1)

VIRGINIA DEPARTMENT OF AGRICULTURE AND CONSUMER SERVICES
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I. PURPOSE

The purpose of this Request For Proposals (RFP) is to solicit proposals to establish a contract with one offeror to provide education, marketing, promotion, and consulting services to the Virginia Spirits Board and develop and execute a fully integrated marketing and branding program for the Virginia Spirits industry. The Virginia Spirits Board (VSB) is a commodity board of the Virginia Department of Agriculture and Consumer Services which is an agency of the Commonwealth of Virginia.

II. BACKGROUND

- A. The Virginia Spirits Board was established in 2020 by the Virginia legislature within the Department of Agriculture and Consumer Services. The purpose of the Spirits Board is to allocate funds to projects that expand spirits distilling research, education, and promotion of the growing of grains and the production of spirits in the Commonwealth.
- B. The Virginia Spirits Board is one of 16 commodity boards within the Virginia Department of Agriculture and Consumer Services.
- C. This is a new solicitation and there is no previous contract for the services.
- D. The marketing budget is approved by the VSB and is established from appropriated funds based on liter taxes. The budget for the initial contract period (2/1/23 – 6/30/24) is \$900,000.

III. STATEMENT OF NEEDS

A. Specific Requirements:

- 1. Offerors should have the ability to develop and implement the Strategic Marketing Plan to enhance the brand image and reputation of Virginia spirits and the Virginia Spirits industry.

Performance expectations for Task for III.A.1:

- a. Provide leadership as regarding the most effective and efficient way to enhance the brand image of Virginia spirits and the Virginia Spirits industry at large.
 - b. Formally brief the Virginia Spirits Board at its quarterly meetings on the status of all board funded marketing initiatives and the marketing budget.
 - c. Submit proposals and recommendations that are substantiated with back-up documentation.
 - d. Develop and implement and economic impact study.
 - e. Identify key strategies to achieve specified goals and measure and evaluate the success of all initiatives within the Plan.
 - f. Develop and implement successful public relations, social media, email marketing and related content development strategies that yield strong results for furthering the Virginia Spirits brand.
 - g. Identify key intellectual property (trademarks, copyrights, design patents) that exist, which must be transferred to new ownership, and/or any new intellectual property that should be established.
- 2. Establish and represent the Virginia Spirits Board Marketing Office.

Performance expectations for Task for III.A.2:

- a. Provide appropriate office space for the Virginia Spirits Marketing Office that is accessible to the public. All staffing, furnishings, security, and operating expenses will be the responsibility of the Awarded Offeror.
 - b. Serve as the primary representative for conducting Virginia Spirits Marketing Office business. Generally, serve as a central location for phone calls, postal mail, deliveries and meetings on behalf of the Virginia Spirits industry.
 - c. Respond the same business day to all requests by the Governor or his cabinet regarding Virginia Spirits and keep the Virginia Spirits Board Chair advised of all requests and action taken.
 - d. Deliver presentations on the Virginia Spirits Industry as necessary to various industry groups and interested organizations as schedules permit.
 - e. Act as a Virginia Spirits industry liaison with pertinent national, state and regional organizations and attend various events representing the Virginia Spirits industry as necessary.
 - f. Maintain ongoing communications with distilleries, media, trade partners and consumers about ongoing Virginia Spirits industry happenings.
3. Develop a comprehensive digital presence for Virginia Spirits through the website and key social media platforms.

Performance expectations for Task for III.A.3:

- a. Ensure the VirginiaSpirits.org web site is a leader among Spirits industry websites, serving as a comprehensive resource for information on all Virginia Distilleries, their products, and their events and happenings.
 - b. Continue prioritizing search engine optimization (SEO) and search engine marketing (SEM) to maintain search position and increase traffic to VirginiaSpirits.org.
 - c. Monitor and grow the use of VirginiaSpirits.org through social media content creation and promotion.
 - d. Ensure events and current marketing promotions are up to date and visible on the website.
 - e. Ensure the website has a place to incorporate Virginia-based resources (ie. grain suppliers, maltsters, cooperages, etc.), so that Virginia distillers have that information readily available.
 - f. Establish, curate, and manage social media accounts for Virginia Spirits across key platforms, including Facebook, Instagram, YouTube and Twitter.
 - g. Drive increasing followers, impressions, and engagement across all social media platforms as it relates to the marketing and promotion of Virginia Spirits, Distilleries, events, and related content.
 - h. Promote Virginia Spirits Trail (see Task 4) through digital content development on VirginiaSpirits.org web site and social media platform.
4. Maintain and build trade, industry and media relations.

Performance expectations for Task for III.A.4:

- a. Maintain an accurate list of key trade, industry, and media stakeholders in promoting Virginia spirits.
- b. Develop a plan, and update it annually, for major trade partner events that garners enthusiasm and sales of Virginia spirits.
- c. Coordinate requests for Virginia spirits samples and tastings for media and government conferences.
- d. Respond to press inquiries.
- e. Organize and oversee Virginia Spirits Industry sponsored trade and media events.
- f. Garner support from trade members through relationship building activities between

- influencers, Virginia distilleries, and distributors of Virginia spirits.
 - g. Leverage cultivated relationships to ensure successful annual programs such as Virginia Spirits Month and the First Landing Cup.
 - h. Evaluate best methods to reach and influence this important audience such as trade tastings, point-of-sale materials, and other strategies.
5. Develop and manage additional marketing programs sponsored by the Virginia Spirits Board for the purposes of building the Virginia Spirits brand in an ever-changing marketplace.

Performance expectations for Task for III.A.5:

- a. Evaluate and define new opportunities for Virginia spirits, such as consumer festivals and press tasting events.
 - b. Build cost effective and efficient marketing programs to achieve intended results.
 - c. Develop measurable results for each new initiative.
 - d. Work with the Virginia ABC to determine a method to track out of state sales of Virginia Spirits.
 - e. Develop The First Landing Cup, an annual showcase and competition for Virginia Spirits in conjunction with the Governor's office.
 - f. Maintain and develop the Virginia Spirits Month.
 - g. Develop and maintain the Virginia Spirits Trail passport program, with possible expansion to digital assets and tracking.
6. Monitor important benchmarks and develop materials for the Virginia Spirits industry for internal and public use, including sales by distribution channel, sales by Spirit type, a list of distilleries and other important data. Survey and report other items as needed such as important education and research needs, spirits marketing needs and priorities, as well as changes in consumer habits and views of Virginia spirits.

Performance expectations for Task for III.A.6:

- a. Utilize a digital survey tool to solicit feedback from all Virginia distilleries and partners.
- b. Conduct an annual industry-wide survey to determine marketing and research priorities of all distilleries and partners in Virginia.
- c. Design, produce and distribute an annual Virginia Spirits Guide as approved by the Virginia Spirits Board, as needed.
- d. Survey restaurateurs, distributors, out-of-state liquor shop owners, leading bartenders and consumers to measure changes in brand awareness.
- e. Work with the Virginia ABC to organize raw Virginia sales data and make data available to the industry in an easily consumable fashion.

B. Required Skills and Knowledge:

Offerors should propose a single lead Program Manager that will be assigned to this effort, as well as any and all additional staff required – categorized by key or support staff. Offerors should provide resumes for the Program Manager and all proposed key staff. Offerors should be able to provide a flex facility with staff capable of successful project implementation with the following skillsets:

1. Possess a significant level of interaction with the Spirits trade in both a promotional and spokesperson role. Offerors, therefore, should have a broad understanding of, and a passionate interest in, Spirits and the American Spirits industry.

2. Superior analysis, design, development, implementation and maintaining of products using applications, such as Excel, PowerPoint, QuickBooks, and Adobe Creative Cloud.
3. Ability to prioritize tasks and complete projects in a rapidly changing environment.
4. Strong creative writing skills.
5. Ability to handle confidential and/or sensitive information in a professional manner.
6. Spirits industry experience combined with analytical background and/or category management experience.
7. Extensive experience in consumer product marketing
8. Key staff should possess a bachelor's degree or higher in marketing or related field. MBA preferred.
9. Experience with database marketing tools.
10. Experience with maintaining and improving website content management systems.
11. The ability to interact with state legislators when briefing key industry issues and concerns.

C. Demonstrated Corporate Experience:

Offerors should provide 3-5 examples of recent corporate experience (within last 5 years) consistent with the requirements of this solicitation. Examples should include, but are not limited to, the following:

1. Project Title and Location.
2. Client Name.
3. Start and Completion Dates (month and year).
4. Value (\$).
5. Project Description, organized by VSB Task Title as stated above, if applicable.
6. Key Successes and Achievements.

D. Additional Requirements:

1. Reporting requirements: The Awarded Offeror shall be required to submit an annual report on the Marketing Office. The annual report is required by the Code of Virginia, § 3.2-1101. This requirement, also noted in code, requires the Awarded Offeror to report annually on the receipt and expenditure of funds, as well as on the policies, programs and operational activities of the Awarded Offeror. The annual Awarded Offeror's report is due on or before November 1 each year. Subsequent quarterly reports leading up to the annual report shall use the same reporting format. The Awarded Offeror shall interface with the Virginia Spirits Board Chairman/Vice-Chairman or designate before proceeding with any marketing campaigns or any substantial undertaking. The Awarded Offeror's performance shall be evaluated by the VSB before a decision is made whether or not to renew the contract.

2. Auditor's Report: The Awarded Offeror shall be responsible for implementing a system to account for receivables, sales receipts, billings, expenditures, and assets. Other business activity tracking systems that are conducive to tracking product through the market system to point of delivery are required. The system shall be accessible to private and public sector audit concerns, including but not limited to the Auditor of Public Accounts and the VDACS Internal Auditor.

E. Proposed pricing allocation:

1. Offerors shall provide pricing for the staffing, management, and all operating expenses for the Virginia Spirits Marketing Office to execute the marketing efforts of the VSB (administrative costs – not programmatic costs which include the actual costs of specific marketing efforts).
2. Offerors shall complete and submit the Attachment E. Proposed Pricing Allocation with the proposal. The Marketing Budget, based on the offeror's proposal plan and approach to providing the services, shall be included as an attachment.

IV. **PROPOSAL PREPARATION AND SUBMISSION REQUIREMENTS:**

GENERAL INSTRUCTIONS:

- A. **RFP RESPONSE:** In order to be considered for selection, Offerors must submit a complete response to this RFP. **One (1) original hard copy (paper)** of the entire proposal, including all attachments and proprietary information clearly marked "Original" on the outside of the proposal, and **three (3) copies**, so marked, of each proposal must be submitted to VDACS Procurement office.

If applicable, the outside of the proposal must be marked to denote proprietary information.

1. **PROPOSAL PREPARATION:**

- a. Proposals shall be signed by an authorized representative of the Offeror. All information requested should be submitted. Failure to submit all information requested may result in the purchasing agency requiring prompt submission of missing information and/or giving a lowered evaluation of the proposal. Proposals that are substantially incomplete or lack key information may be rejected by the purchasing agency. Mandatory requirements are those required by law or regulation or are such that they cannot be waived and are not subject to negotiation.
- b. Proposals should be prepared simply and economically, providing a straightforward, concise description of capabilities to satisfy the requirements of the RFP. Emphasis should be placed on completeness and clarity of content.
- c. Proposals should be organized in the order in which the requirements are presented in the RFP. All pages of the proposal should be numbered. Each paragraph in the proposal should reference the paragraph number of the corresponding section of the RFP. It is also helpful to cite the paragraph number and sub letter and to repeat the text of the requirement as it appears in the RFP. If a response covers more than one page, the paragraph number and sub letter should be repeated at the top of the next page. The proposal should contain a table of contents that cross references the RFP requirements. Information that the offeror desires to present that does not fall within

any of the requirements of the RFP should be inserted at an appropriate place or be attached at the end of the proposal and designated as additional material. Proposals that are not organized in this manner risk elimination from consideration if the evaluators are unable to find where the RFP requirements are specifically addressed.

- d. As used in this RFP, the terms "must", "shall", "should" and "may" identify the criticality of requirements. "Must" and "shall" identify requirements whose absence will have a major negative impact on the suitability of the proposed solution. Items labeled as "should" or "may" are highly desirable, although their absence will not have a large impact and would be useful, but are not necessary. Depending on the overall response to the RFP, some individual "must" and "shall" items may not be fully satisfied, but it is the intent to satisfy most, if not all, "must" and "shall" requirements. The inability of an Offeror to satisfy a "must" or "shall" requirement does not automatically remove that Offeror from consideration; however, it may seriously affect the overall rating of the Offerors' proposal.
- e. Each copy of the proposal should be bound or contained in a single volume where practical. All documentation submitted with the proposal should be contained in that single volume.
- f. Ownership of all data, materials, and documentation originated and prepared for the State pursuant to the RFP shall belong exclusively to the State and be subject to public inspection in accordance with the *Virginia Freedom of Information Act*. Trade secrets or proprietary information submitted by an offeror shall not be subject to public disclosure under the *Virginia Freedom of Information Act*; however, the offeror must invoke the protections of § 2.2-4342F of the *Code of Virginia*, in writing, either before or at the time the data or other material is submitted. The written notice must specifically identify the data or materials to be protected and state the reasons why protection is necessary. The proprietary or trade secret material submitted must be identified by some distinct method such as highlighting or underlining and must indicate only the specific words, figures, or paragraphs that constitute trade secret or proprietary information. The classification of an entire proposal document or prequalification application, line-item prices, and/or total proposal prices as proprietary or trade secrets is not acceptable and will result in rejection of the proposal. If, after being given reasonable time, the offeror refuses to withdraw an entire classification designation, the proposal will be rejected.

- 2. **Oral Presentation**: Offerors who submit a proposal in response to this RFP may be required to give an oral presentation of their proposal to the agency. This provides an opportunity for the offeror to clarify or elaborate on the proposal. This is a fact-finding and explanation session only and does not include negotiation. The issuing agency will schedule the time and location of these presentations. Oral presentations are an option of the purchasing agency and may or may not be conducted.

- B. **SPECIFIC REQUIREMENTS OF PROPOSAL**: Proposals should be as thorough and detailed as possible so that the Agency evaluation team may properly evaluate your capabilities to provide the required services. Offerors are required to submit the following items as a complete proposal. The proposal response must be submitted in the same order as outlined below, to include the same "TAB" headings.

Tab 1. Return of the RFP cover sheet and all addenda acknowledgments, if any, signed and filled out as required.

- Tab 2. Offeror Information Sheet (Attachment A) and a written narrative describing the Offeror's management and spirits industry experience, including, but not limited to the following:
- a. Experience of your company and its staff in providing the services described in the Statement of Needs;
 - b. Names, qualifications and experience of the project manager and team to be assigned to the project; and
 - c. Capacity to provide services within your firm's current workload commitments.

Information should address the ability to meet the skills and knowledge requirements described herein.

- Tab 3. Specific approach and plan for providing the goods/services described herein including, but not limited to, achieving performance expectations related to:
- a. Strategic marketing plan;
 - b. Providing services, establishing, and operating the Virginia Spirits Marketing Office; including the proposed location of the office.
 - c. Website, social media and electronic marketing;
 - d. Organizing trade and media events;
 - e. Developing marketing programs;
 - f. Monitoring distilleries.

Also, provide information on Offeror's plan to meet reporting requirements and describe the system that will be utilized for tracking activity.

Tab 4. Offeror's Reference Data Sheet (Attachment B)

Tab 5. Small Business Subcontracting Plan (Attachment C) – Summarize the planned utilization of DSBSD-certified small businesses under the contract to be awarded as a result of this solicitation. Submit both pages of Attachment C.

Tab 6. State Corporation Commission Form, submit Attachment D.

Tab 7. Attachment E – Proposed Pricing

Provide pricing for the establishment, staffing, expenses, and management of the Marketing Office to execute the marketing efforts of the VSB (administrative costs—not programmatic costs which include the actual costs of specific marketing efforts). All prices shall be stated in U.S. dollars.

Include Offeror's proposed, detailed operational and financial plans.

Tab 8. Exceptions, submit Attachment F: Does your Firm accept Section III, "STATEMENT OF NEEDS", Section VI, the "GENERAL TERMS AND CONDITIONS", and Section VII, the "SPECIAL TERMS AND CONDITIONS," as presented in the RFP?

V. EVALUATION CRITERIA

A. Evaluation Criteria: Proposals shall be evaluated using the following criteria:

CATEGORY	POINT VALUE
Plans and approach for providing the services.	35
Experience and qualifications of the firm and assigned personnel.	20
Price Allocation / Marketing Budget	25
Small Business Subcontracting Plan	20

VI. GENERAL TERMS AND CONDITIONS

- A. **VENDORS MANUAL**: This solicitation is subject to the provisions of the Commonwealth of Virginia *Vendors Manual* and any changes or revisions thereto, which are hereby incorporated into this contract in their entirety. The process for filing a complaint about this solicitation is in section 7.13 of the *Vendors Manual*. (Note section 7.13 does not apply to protests of awards or formal contractual claims.) The procedure for filing contractual claims is in section 7.19 of the *Vendors Manual*. A copy of the manual is normally available for review at the purchasing office and is accessible on the Internet at www.eva.virginia.gov under "I Sell To Virginia".
- B. **APPLICABLE LAWS AND COURTS**: This solicitation and any resulting contract shall be governed in all respects by the laws of the Commonwealth of Virginia, without regard to its choice of law provisions, and any litigation with respect thereto shall be brought in the circuit courts of the Commonwealth. The agency and the contractor are encouraged to resolve any issues in controversy arising from the award of the contract or any contractual dispute using Alternative Dispute Resolution (ADR) procedures (*Code of Virginia*, § 2.2-4366). ADR procedures are described in Chapter 9 of the *Vendors Manual*. The contractor shall comply with all applicable federal, state and local laws, rules and regulations.
- C. **ANTI-DISCRIMINATION**: By submitting their (bids/proposals), (bidders/offerors) certify to the Commonwealth that they will conform to the provisions of the Federal Civil Rights Act of 1964, as amended, as well as the Virginia Fair Employment Contracting Act of 1975, as amended, where applicable, the Virginians With Disabilities Act, the Americans With Disabilities Act and § 2.2-4311 of the *Virginia Public Procurement Act (VPPA)*. If the award is made to a faith-based organization, the organization shall not discriminate against any recipient of goods, services, or disbursements made pursuant to the contract on the basis of the recipient's religion, religious belief, refusal to participate in a religious practice, or on the basis of race, age, color, gender sexual orientation, gender identity, or national origin and shall be subject to the same rules as other organizations that contract with public bodies to account for the use of the funds provided; however, if the faith-based organization segregates public funds into separate accounts, only the accounts and programs funded with public funds shall be subject to audit by the public body. (*Code of Virginia*, § 2.2-4343.1E).

In every contract over \$10,000 the provisions in 1. and 2. below apply:

1. During the performance of this contract, the contractor agrees as follows:

- a. The contractor will not discriminate against any employee or applicant for employment because of race, religion, color, sex, sexual orientation, gender identity, national origin, age, disability, or any other basis prohibited by state law relating to discrimination in employment, except where there is a bona fide occupational qualification reasonably necessary to the normal operation of the

contractor. The contractor agrees to post in conspicuous places, available to employees and applicants for employment, notices setting forth the provisions of this nondiscrimination clause.

- b. The contractor, in all solicitations or advertisements for employees placed by or on behalf of the contractor, will state that such contractor is an equal opportunity employer.
- c. Notices, advertisements and solicitations placed in accordance with federal law, rule or regulation shall be deemed sufficient for the purpose of meeting the requirements of this section.
- d. If the contractor employs more than five employees, the contractor shall (i) provide annual training on the contractor's sexual harassment policy to all supervisors and employees providing services in the Commonwealth, except such supervisors or employees that are required to complete sexual harassment training provided by the Department of Human Resource Management, and (ii) post the contractor's sexual harassment policy in (a) a conspicuous public place in each building located in the Commonwealth that the contractor owns or leases for business purposes and (b) the contractor's employee handbook.
- e. The requirements of these provisions 1. and 2. are a material part of the contract. If the Contractor violates one of these provisions, the Commonwealth may terminate the affected part of this contract for breach, or at its option, the whole contract. Violation of one of these provisions may also result in debarment from State contracting regardless of whether the specific contract is terminated.
- f. In accordance with Executive Order 61 (2017), a prohibition on discrimination by the contractor, in its employment practices, subcontracting practices, and delivery of goods or services, on the basis of race, sex, color, national origin, religion, sexual orientation, gender identity, age, political affiliation, disability, or veteran status, is hereby incorporated in this contract.

2. The contractor will include the provisions of 1. above in every subcontract or purchase order over \$10,000, so that the provisions will be binding upon each subcontractor or vendor.

- D. **ETHICS IN PUBLIC CONTRACTING**: By submitting their (bids/proposals), (bidders/offerors) certify that their (bids/proposals) are made without collusion or fraud and that they have not offered or received any kickbacks or inducements from any other (bidder/offeror), supplier, manufacturer or subcontractor in connection with their (bid/proposal), and that they have not conferred on any public employee having official responsibility for this procurement transaction any payment, loan, subscription, advance, deposit of money, services or anything of more than nominal value, present or promised, unless consideration of substantially equal or greater value was exchanged.
- E. **IMMIGRATION REFORM AND CONTROL ACT OF 1986**: Applicable for all contracts over \$10,000: By entering into a written contract with the Commonwealth of Virginia, the Contractor certifies that the Contractor does not, and shall not during the performance of the contract for goods and services in the Commonwealth, knowingly employ an unauthorized alien as defined in the federal Immigration Reform and Control Act of 1986.
- F. **DEBARMENT STATUS**: By participating in this procurement, the vendor certifies that they are not currently debarred by the Commonwealth of Virginia from submitting a response for the type of goods and/or services covered by this solicitation. Vendor further certifies that they are not debarred from filling any order or accepting any resulting order, or that they are an agent of any person or entity that is currently debarred by the Commonwealth of Virginia.

If a vendor is created or used for the purpose of circumventing a debarment decision against another vendor, the non-debarred vendor will be debarred for the same time period as the debarred vendor.

- G. **ANTITRUST**: By entering into a contract, the contractor conveys, sells, assigns, and transfers to the

Commonwealth of Virginia all rights, title and interest in and to all causes of action it may now have or hereafter acquire under the antitrust laws of the United States and the Commonwealth of Virginia, relating to the particular goods or services purchased or acquired by the Commonwealth of Virginia under said contract.

- H. **MANDATORY USE OF STATE FORM AND TERMS AND CONDITIONS FOR IFBs AND RFPs:** Failure to submit a proposal on the official state form provided for that purpose may be a cause for rejection of the proposal. Modification of or additions to the General Terms and Conditions of the solicitation may be cause for rejection of the proposal; however, the Commonwealth reserves the right to decide, on a case by case basis, in its sole discretion, whether to reject such a proposal.
- I. **CLARIFICATION OF TERMS:** If any prospective (bidder/offeror) has questions about the specifications or other solicitation documents, the prospective (bidder/offeror) should contact the buyer whose name appears on the face of the solicitation no later than five working days before the due date. Any revisions to the solicitation will be made only by addendum issued by the buyer.
- J. **PAYMENT:**
1. **To Prime Contractor:**
 - a. Invoices for items ordered, delivered, and accepted shall be submitted by the contractor directly to the payment address shown on the purchase order/contract. All invoices shall show the state contract number and/or purchase order number; social security number (for individual contractors), or the federal employer identification number (for proprietorships, partnerships, and corporations).
 - b. Any payment terms requiring payment in less than 30 days will be regarded as requiring payment 30 days after invoice or delivery, whichever occurs last. This shall not affect offers of discounts for payment in less than 30 days, however.
 - c. All goods or services provided under this contract or purchase order that are to be paid for with public funds shall be billed by the contractor at the contract price, regardless of which public agency is being billed.
 - d. The following shall be deemed to be the date of payment: the date of postmark in all cases where payment is made by mail, or when offset proceedings have been instituted as authorized under the Virginia Debt Collection Act.
 - e. **Unreasonable Charges.** Under certain emergency procurements and for most time and material purchases, final job costs cannot be accurately determined at the time orders are placed. In such cases, contractors should be put on notice that final payment in full is contingent on a determination of reasonableness with respect to all invoiced charges. Charges which appear to be unreasonable will be resolved in accordance with *Code of Virginia*, § 2.2-4363 and 2.2-4364. Upon determining that invoiced charges are not reasonable, the Commonwealth shall notify the contractor of defects or improprieties in invoices within fifteen (15) days as required in *Code of Virginia*, § 2.2-4351. The provisions of this section do not relieve an agency of its prompt payment obligations with respect to those charges which are not in dispute (*Code of Virginia*, § 2.2-4363).
 2. **To Subcontractors:**
 - a. Within seven (7) days of the contractor's receipt of payment from the Commonwealth, a contractor awarded a contract under this solicitation is hereby obligated:

- (1) To pay the subcontractor(s) for the proportionate share of the payment received for work performed by the subcontractor(s) under the contract; or
 - (2) To notify the agency and the subcontractor(s), in writing, of the contractor's intention to withhold payment and the reason.
- b. The contractor is obligated to pay the subcontractor(s) interest at the rate of one percent per month (unless otherwise provided under the terms of the contract) on all amounts owed by the contractor that remain unpaid seven (7) days following receipt of payment from the Commonwealth, except for amounts withheld as stated in (2) above. The date of mailing of any payment by U. S. Mail is deemed to be payment to the addressee. These provisions apply to each sub-tier contractor performing under the primary contract. A contractor's obligation to pay an interest charge to a subcontractor may not be construed to be an obligation of the Commonwealth.
3. Each prime contractor who wins an award in which provision of a SWAM procurement plan is a condition to the award, shall deliver to the contracting agency or institution, on or before request for final payment, evidence and certification of compliance (subject only to insubstantial shortfalls and to shortfalls arising from subcontractor default) with the SWAM procurement plan. Final payment under the contract in question may be withheld until such certification is delivered and, if necessary, confirmed by the agency or institution, or other appropriate penalties may be assessed in lieu of withholding such payment.
 4. The Commonwealth of Virginia encourages contractors and subcontractors to accept electronic and credit card payments.
- K. **PRECEDENCE OF TERMS:** The following General Terms and Conditions *VENDORS MANUAL, APPLICABLE LAWS AND COURTS, ANTI-DISCRIMINATION, ETHICS IN PUBLIC CONTRACTING, IMMIGRATION REFORM AND CONTROL ACT OF 1986, DEPARTMENT STATUS, ANTITRUST, MANDATORY USE OF STATE FORM AND TERMS AND CONDITIONS, CLARIFICATION OF TERMS, PAYMENT* shall apply in all instances. In the event there is a conflict between any of the other General Terms and Conditions and any Special Terms and Conditions in this solicitation, the Special Terms and Conditions shall apply.
- L. **QUALIFICATIONS OF OFFERORS:** The Commonwealth may make such reasonable investigations as deemed proper and necessary to determine the ability of the (bidder/offeror) to perform the services/furnish the goods and the (bidder/offeror) shall furnish to the Commonwealth all such information and data for this purpose as may be requested. The Commonwealth reserves the right to inspect (bidder's/offeror's) physical facilities prior to award to satisfy questions regarding the (bidder's/offeror's) capabilities. The Commonwealth further reserves the right to reject any (bid/proposal) if the evidence submitted by, or investigations of, such (bidder/offeror) fails to satisfy the Commonwealth that such (bidder/offeror) is properly qualified to carry out the obligations of the contract and to provide the services and/or furnish the goods contemplated therein.
- M. **TESTING AND INSPECTION:** The Commonwealth reserves the right to conduct any test/inspection it may deem advisable to assure goods and services conform to the specifications.
- N. **ASSIGNMENT OF CONTRACT:** A contract shall not be assignable by the contractor in whole or in part without the written consent of the Commonwealth.
- O. **CHANGES TO THE CONTRACT:** Changes can be made to the contract in any of the following ways:
1. The parties may agree in writing to modify the terms, conditions, or scope of the contract. Any

additional goods or services to be provided shall be of a sort that is ancillary to the contract goods or services, or within the same broad product or service categories as were included in the contract award. Any increase or decrease in the price of the contract resulting from such modification shall be agreed to by the parties as a part of their written agreement to modify the scope of the contract.

2. The Purchasing Agency may order changes within the general scope of the contract at any time by written notice to the contractor. Changes within the scope of the contract include, but are not limited to, things such as services to be performed, the method of packing or shipment, and the place of delivery or installation. The contractor shall comply with the notice upon receipt, unless the contractor intends to claim an adjustment to compensation, schedule, or other contractual impact that would be caused by complying with such notice, in which case the contractor shall, in writing, promptly notify the Purchasing Agency of the adjustment to be sought, and before proceeding to comply with the notice, shall await the Purchasing Agency's written decision affirming, modifying, or revoking the prior written notice. If the Purchasing Agency decides to issue a notice that requires an adjustment to compensation, the contractor shall be compensated for any additional costs incurred as the result of such order and shall give the Purchasing Agency a credit for any savings. Said compensation shall be determined by one of the following methods:
 - a. By mutual agreement between the parties in writing; or
 - b. By agreeing upon a unit price or using a unit price set forth in the contract, if the work to be done can be expressed in units, and the contractor accounts for the number of units of work performed, subject to the Purchasing Agency's right to audit the contractor's records and/or to determine the correct number of units independently; or
 - c. By ordering the contractor to proceed with the work and keep a record of all costs incurred and savings realized. A markup for overhead and profit may be allowed if provided by the contract. The same markup shall be used for determining a decrease in price as the result of savings realized. The contractor shall present the Purchasing Agency with all vouchers and records of expenses incurred and savings realized. The Purchasing Agency shall have the right to audit the records of the contractor as it deems necessary to determine costs or savings. Any claim for an adjustment in price under this provision must be asserted by written notice to the Purchasing Agency within thirty (30) days from the date of receipt of the written order from the Purchasing Agency. If the parties fail to agree on an amount of adjustment, the question of an increase or decrease in the contract price or time for performance shall be resolved in accordance with the procedures for resolving disputes provided by the Disputes Clause of this contract or, if there is none, in accordance with the disputes provisions of the Commonwealth of Virginia *Vendors Manual*. Neither the existence of a claim nor a dispute resolution process, litigation or any other provision of this contract shall excuse the contractor from promptly complying with the changes ordered by the Purchasing Agency or with the performance of the contract generally.
- P. **DEFAULT:** In case of failure to deliver goods or services in accordance with the contract terms and conditions, the Commonwealth, after due oral or written notice, may procure them from other sources and hold the contractor responsible for any resulting additional purchase and administrative costs. This remedy shall be in addition to any other remedies which the Commonwealth may have.
- Q. **INSURANCE:** By signing and submitting a bid or proposal under this solicitation, the bidder or offeror certifies that if awarded the contract, it will have the following insurance coverage at the time the contract is awarded. For construction contracts, if any subcontractors are involved, the subcontractor will have workers' compensation insurance in accordance with §§ 2.2-4332 and 65.2-800 et seq. of the *Code of Virginia*. The bidder or offeror further certifies that the contractor and any subcontractors will maintain these insurance coverages during the entire term of the contract and that all insurance coverage will be provided by insurance companies authorized to sell insurance in Virginia by the Virginia State Corporation Commission.

MINIMUM INSURANCE COVERAGES AND LIMITS:

1. Workers' Compensation - Statutory requirements and benefits. Coverage is compulsory for employers of three or more employees, to include the employer. Contractors who fail to notify the Commonwealth of increases in the number of employees that change their workers' compensation requirements under the Code of Virginia during the course of the contract shall be in noncompliance with the contract.
 2. Employer's Liability - \$100,000
 3. Commercial General Liability - \$1,000,000 per occurrence and \$2,000,000 in the aggregate. Commercial General Liability is to include bodily injury and property damage, personal injury and advertising injury, products and completed operations coverage. The Commonwealth of Virginia shall be added as an additional insured to the policy by an endorsement.
 4. Automobile Liability - \$1,000,000 combined single limit. (Required only if a motor vehicle not owned by the Commonwealth is to be used in the contract. Contractor must assure that the required coverage is maintained by the Contractor (or third party owner of such motor vehicle.)
- R. **ANNOUNCEMENT OF AWARD:** Upon the award or the announcement of the decision to award a contract as a result of this solicitation, the purchasing agency will publicly post such notice in eVA (www.eva.virginia.gov) for a minimum of 10 days.
- S. **DRUG-FREE WORKPLACE:** Applicable for all contracts over \$10,000: During the performance of this contract, the contractor agrees to (i) provide a drug-free workplace for the contractor's employees; (ii) post in conspicuous places, available to employees and applicants for employment, a statement notifying employees that the unlawful manufacture, sale, distribution, dispensation, possession, or use of a controlled substance or marijuana is prohibited in the contractor's workplace and specifying the actions that will be taken against employees for violations of such prohibition; (iii) state in all solicitations or advertisements for employees placed by or on behalf of the contractor that the contractor maintains a drug-free workplace; and (iv) include the provisions of the foregoing clauses in every subcontract or purchase order of over \$10,000, so that the provisions will be binding upon each subcontractor or vendor.
- For the purposes of this section, "*drug-free workplace*" means a site for the performance of work done in connection with a specific contract awarded to a contractor, the employees of whom are prohibited from engaging in the unlawful manufacture, sale, distribution, dispensation, possession or use of any controlled substance or marijuana during the performance of the contract.
- T. **NONDISCRIMINATION OF CONTRACTORS:** A bidder, offeror, or contractor shall not be discriminated against in the solicitation or award of this contract because of race, religion, color, sex, sexual orientation, gender identity, national origin, age, disability, faith-based organizational status, any other basis prohibited by state law relating to discrimination in employment or because the bidder or offeror employs ex-offenders unless the state agency, department or institution has made a written determination that employing ex-offenders on the specific contract is not in its best interest. If the award of this contract is made to a faith-based organization and an individual, who applies for or receives goods, services, or disbursements provided pursuant to this contract objects to the religious character of the faith-based organization from which the individual receives or would receive the goods, services, or disbursements, the public body shall offer the individual, within a reasonable period of time after the date of his objection, access to equivalent goods, services, or disbursements from an alternative provider.
- U. **eVA BUSINESS-TO-GOVERNMENT VENDOR REGISTRATION, CONTRACTS, AND ORDERS:** The eVA Internet electronic procurement solution, website portal www.eVA.virginia.gov, streamlines and automates government purchasing activities in the Commonwealth. The eVA portal is the gateway for

vendors to conduct business with state agencies and public bodies. All vendors desiring to provide goods and/or services to the Commonwealth shall participate in the eVA Internet eprocurement solution by completing the free eVA Vendor Registration. All offerors must register in eVA and pay the Vendor Transaction Fees specified below; failure to register will result in the proposal being rejected.

Vendor transaction fees are determined by the date the original purchase order is issued and the current fees are as follows:

- a. For orders issued July 1, 2014 and after, the Vendor Transaction Fee is:
 - (i) DMBE-certified Small Businesses: 1%, capped at \$500 per order.
 - (ii) Businesses that are not DMBE-certified Small Businesses: 1%, capped at \$1,500 per order.
- b. Refer to Special Term and Condition "eVA Orders and Contracts" to identify the number of purchase orders that will be issued as a result of this solicitation/contract with the eVA transaction fee specified above assessed for each order.

For orders issued prior to July 1, 2014 the vendor transaction fees can be found at www.eVA.virginia.gov.

The specified vendor transaction fee will be invoiced, by the Commonwealth of Virginia Department of General Services, typically within 60 days of the order issue date. Any adjustments (increases/decreases) will be handled through purchase order changes.

- V. **AVAILABILITY OF FUNDS:** It is understood and agreed between the parties herein that the agency shall be bound hereunder only to the extent that the legislature has appropriated funds that are legally available or may hereafter become legally available for the purpose of this agreement.
- W. **SET-ASIDES IN ACCORDANCE WITH THE SMALL BUSINESS ENHANCEMENT AWARD PRIORITY.** This solicitation is set-aside for award priority to DSBSD-certified micro businesses or small businesses when designated as "Micro Business Set-Aside Award Priority" or "Small Business Set-Aside Award Priority" accordingly in the solicitation. DSBSD-certified micro businesses or small businesses also include DSBSD-certified women-owned and minority-owned businesses when they have received the DSBSD small business certification. For purposes of award, bidders/offerors shall be deemed micro businesses or small businesses if and only if they are certified as such by DSBSD on the due date for receipt of bids/proposals.
- X. **BID PRICE CURRENCY:** Unless stated otherwise in the solicitation, offerors shall state offer prices in US dollars.
- Y. **AUTHORIZATION TO CONDUCT BUSINESS IN THE COMMONWEALTH:** A contractor organized as a stock or nonstock corporation, limited liability company, business trust, or limited partnership or registered as a registered limited liability partnership shall be authorized to transact business in the Commonwealth as a domestic or foreign business entity if so required by Title 13.1 or Title 50 of the *Code of Virginia* or as otherwise required by law. Any business entity described above that enters into a contract with a public body pursuant to the *Virginia Public Procurement Act* shall not allow its existence to lapse or its certificate of authority or registration to transact business in the Commonwealth, if so required under Title 13.1 or Title 50, to be revoked or cancelled at any time during the term of the contract. A public body may void any contract with a business entity if the business entity fails to remain in compliance with the provisions of this section.
- Z. **CIVILITY IN STATE WORKPLACES:** The contractor shall take all reasonable steps to ensure that no individual, while performing work on behalf of the contractor or any subcontractor in connection with this agreement (each, a "Contract Worker"), shall engage in 1) harassment (including sexual harassment),

bullying, cyber-bullying, or threatening or violent conduct, or 2) discriminatory behavior on the basis of race, sex, color, national origin, religious belief, sexual orientation, gender identity or expression, age, political affiliation, veteran status, or disability.

The contractor shall provide each Contract Worker with a copy of this Section and will require Contract Workers to participate in agency training on civility in the State workplace if contractor's (and any subcontractor's) regular mandatory training programs do not already encompass equivalent or greater expectations. Upon request, the contractor shall provide documentation that each Contract Worker has received such training.

For purposes of this Section, "State workplace" includes any location, permanent or temporary, where a Commonwealth employee performs any work-related duty or is representing his or her agency, as well as surrounding perimeters, parking lots, outside meeting locations, and means of travel to and from these locations. Communications are deemed to occur in a State workplace if the Contract Worker reasonably should know that the phone number, email, or other method of communication is associated with a State workplace or is associated with a person who is a State employee.

The Commonwealth of Virginia may require, at its sole discretion, the removal and replacement of any Contract Worker who the Commonwealth reasonably believes to have violated this Section.

This Section creates obligations solely on the part of the contractor. Employees or other third parties may benefit incidentally from this Section and from training materials or other communications distributed on this topic, but the Parties to this agreement intend this Section to be enforceable solely by the Commonwealth and not by employees or other third parties.

VII. SPECIAL TERMS AND CONDITIONS

- A. **AUDIT:** The contractor shall retain all books, records, and other documents relative to this contract for five (5) years after final payment, or until audited by the Commonwealth of Virginia, whichever is sooner. The agency, its authorized agents, and/or state auditors shall have full access to and the right to examine any of said materials during said period.
- B. **AWARD:** Selection shall be made of two or more offerors deemed to be fully qualified and best suited among those submitting proposals on the basis of the evaluation factors included in the Request for Proposals, including price, if so stated in the Request for Proposals. Negotiations shall be conducted with the offerors so selected. Price shall be considered, but need not be the sole determining factor. After negotiations have been conducted with each offeror so selected, the agency shall select the offeror which, in its opinion, has made the best proposal, and shall award the contract to that offeror. The Commonwealth may cancel this Request for Proposals or reject proposals at any time prior to an award, and is not required to furnish a statement of the reasons why a particular proposal was not deemed to be the most advantageous (*Code of Virginia*, § 2.2-4359D). Should the Commonwealth determine in writing and in its sole discretion that only one offeror is fully qualified, or that one offeror is clearly more highly qualified than the others under consideration, a contract may be negotiated and awarded to that offeror. The award document will be a contract incorporating by reference all the requirements, terms and conditions of the solicitation and the contractor's proposal as negotiated.
- C. **CANCELLATION OF CONTRACT:** The purchasing agency reserves the right to cancel and terminate any resulting contract, in part or in whole, without penalty, upon 60 days written notice to the contractor. In the event the initial contract period is for more than 12 months, the resulting contract may also be terminated by the contractor, without penalty, after the initial 12 months of the contract period upon 60 days written notice to the other party. Any contract cancellation notice shall not relieve the contractor of the obligation to deliver and/or perform on all outstanding orders issued prior to the effective date of

Subcontracting Plan or is in receipt of a written explanation of the variance. The agency or institution reserves the right to pursue other appropriate remedies for non-compliance to include, but not be limited to, termination for default.

C. Prime Contractor Subcontractor Reporting:

1. Each prime contractor who wins an award greater than \$100,000, shall deliver to the contracting agency or institution on a quarterly basis, information on use of subcontractors that are DSBSD-certified businesses or ESOs. The contractor agrees to furnish the purchasing office at a minimum the following information: name of firm, phone number, total dollar amount subcontracted, category type (Businesses that are DSBSD-certified small, women-owned, minority-owned, Service Disabled Veteran, or Employment Services Organization) and type of product/service provided, at the frequency required.
2. In addition each prime contractor who wins an award greater than \$200,000 shall deliver to the contracting agency or institution on a quarterly basis, information on use of subcontractors that are **not** DSBSD-certified businesses. The contractor agrees to furnish the purchasing office at a minimum the following information: name of firm, phone number, total dollar amount subcontracted and type of product/service provided, at the frequency required.

H. **OPTIONAL PRE-PROPOSAL CONFERENCE:** An optional pre-proposal teleconference will be held at 11:00 a.m. on November 10, 2022. The purpose of this teleconference is to allow potential offerors an opportunity to present questions and obtain clarification relative to any facet of the solicitation.

While attendance at this teleconference will not be a prerequisite to submitting a proposal, offerors who intend to submit a proposal are encouraged to participate. Any changes resulting from this teleconference will be issued in a written addendum to the solicitation.

Microsoft Teams Meeting
Meeting ID: 282 147 199 626
Passcode: objCPm

Phone Number: [+1 434-230-0065,935164038#](tel:+14342300065935164038) United States, Lynchburg
Phone Conference ID: 935 164 038#

- I. **PRIME CONTRACTOR RESPONSIBILITIES:** The contractor shall be responsible for completely supervising and directing the work under this contract and all subcontractors that he may utilize, using his best skill and attention. Subcontractors who perform work under this contract shall be responsible to the prime contractor. The contractor agrees that he is as fully responsible for the acts and omissions of his subcontractors and of persons employed by them as he is for the acts and omissions of his own employees.
- J. **SUBCONTRACTS:** No portion of the work shall be subcontracted without prior written consent of the purchasing agency. In the event that the contractor desires to subcontract some part of the work specified herein, the contractor shall furnish the purchasing agency the names, qualifications and experience of their proposed subcontractors. The contractor shall, however, remain fully liable and responsible for the work to be done by its subcontractor(s) and shall assure compliance with all requirements of the contract.
- K. **INDEPENDENT CONTRACTOR:** The Contractor is an independent contractor, not an employee or agent, of VDACS. Without limitation of the foregoing, the Contractor shall:
 1. Not enter into any contract, agreement, or other commitment, or incur any obligation or liability, in the name or otherwise on behalf of VDACS;

2. Not be entitled to any worker's compensation, pension, retirement, insurance, or other benefits afforded to employees of VDACS;
3. Provide for all national income tax and other withholding relating to the Contractor's compensation;
4. Pay all social security, unemployment, and other employer taxes relating to the Contractor's performance of the services herein; and
5. Perform all reporting, recordkeeping, administrative, and similar functions relating to the Contractor's compensation.

L. **CONTINUITY OF SERVICES:**

1. The Contractor recognizes that the services under this contract are vital to the Agency and must be continued without interruption and that, upon contract expiration, a successor, either the Agency or another contractor, may continue them. The Contractor agrees:
 - (a) To exercise its best efforts and cooperation to effect an orderly and efficient transition to a successor;
 - (b) To make all Agency owned facilities, equipment, and data available to any successor at an appropriate time prior to the expiration of the contract to facilitate transition to successor; and
 - (c) That the Agency Contracting Officer shall have final authority to resolve disputes related to the transition of the contract from the Contractor to its successor.
2. The Contractor shall, upon written notice from the Contract Officer, furnish phase-in/phase-out services for up to ninety (90) days after this contract expires and shall negotiate in good faith a plan with the successor to execute the phase-in/phase-out services. This plan shall be subject to the Contract Officer's approval.
3. The Contractor shall be reimbursed for all reasonable, pre-approved phase-in/phase-out costs (i.e., costs incurred within the agreed period after contract expiration that result from phase-in, phase-out operations) and a fee (profit) not to exceed a pro rata portion of the fee (profit) under this contract. All phase-in/phase-out work fees must be approved by the Contract Officer in writing prior to commencement of said work.

M. **STATE CORPORATION COMMISSION IDENTIFICATION NUMBER:** Pursuant to Code of Virginia, §2.2-4311.2 subsection B, an offeror organized or authorized to transact business in the Commonwealth pursuant to Title 13.1 or Title 50 is required to include in its proposal the identification number issued to it by the State Corporation Commission (SCC). Any offeror that is not required to be authorized to transact business in the Commonwealth as a foreign business entity under Title 13.1 or Title 50 or as otherwise required by law is required to include in its proposal a statement describing why the offeror is not required to be so authorized. Indicate the above information on the SCC Form provided. Contractor agrees that the process by which compliance with Titles 13.1 and 50 is checked during the solicitation stage (including without limitation the SCC Form provided) is streamlined and not definitive, and the Commonwealth's use and acceptance of such form, or its acceptance of Contractor's statement describing why the offeror was not legally required to be authorized to transact business in the Commonwealth, shall not be conclusive of the issue and shall not be relied upon by the Contractor as demonstrating compliance.

N. **E-VERIFY PROGRAM:** EFFECTIVE 12/1/13. Pursuant to *Code of Virginia*, §2.2-4308.2., any employer with more than an average of 50 employees for the previous 12 months entering into a contract in excess of \$50,000 with any agency of the Commonwealth to perform work or provide services pursuant to such contract shall register and participate in the E-Verify program to verify information and work authorization of its newly hired employees performing work pursuant to such public contract. Any such employer who fails to comply with these provisions shall be debarred from contracting with any agency of the Commonwealth for a period up to one year. Such debarment shall cease upon the employer's registration and participation in the E-Verify program. If requested, the employer shall present a copy of their Maintain Company page from E-Verify to prove that they are enrolled in E-Verify.

VIII. METHOD OF PAYMENT:

The Awarded Offeror's fees will be paid by check or electronic transfer per the Code of Virginia § 2.2-4350 prompt payment of bills by state agencies, upon receipt of a valid and complete invoice(s) for services. All invoices shall be detailed, reference the appropriate eVA purchase order number, and include a clear breakdown of the charges. VDACS reserves the right to request additional documentation including, but not limited to: actual invoices by suppliers, justification for expenditure, etc.

The Awarded Offeror's invoices shall be submitted by no later than the 15th day of the month and will be paid within 30 days of receipt of a valid and complete invoice with sufficient supporting documentation submitted by mail or electronically to: Jennifer Atkins (jennifer.atkins@vdacs.virginia.gov) or designated VDACS staff member, as well as vdacspayables@vdacs.virginia.gov

ATTACHMENT A:

Offeror's Information Sheet

(Name of Offering Firm)

(Principle Firm Address)

(City, State, Zip Code)

(Signature of Offeror's Representative)

(Printed Name of Offeror's Representative)

(Representative's Title)

(Offering Firm's Telephone Number)

(Offering Firm's Fax Number)

(Offering Firm's E-Mail Address)

RETURN OF THIS PAGE IS REQUIRED (Tab 2)

ATTACHMENT B:

OFFEROR'S REFERENCE DATA SHEET

1. **QUALIFICATIONS OF OFFEROR:** The Offeror must have the capability and capacity in all respects in order to fully satisfy all of the contractual requirements.
2. **YEARS IN BUSINESS:** Indicate the length of time you have been in the business of performing the services identified in this solicitation: _____years _____months.
3. **REFERENCES:** Indicate below a listing of at least three (3) recent references for which your firm has provide similar services. Include the dates of service and name and address of the person the agency has your permission to contact.

Client Name & Contact	Dates of Service	Address	Phone & Email Address

I certify the accuracy of this information.

Signed: _____ Title: _____

Name of Firm: _____

RETURN OF THIS PAGE IS REQUIRED (TAB 4)

ATTACHMENT C:

Small Business Subcontracting Plan

It is the goal of the Commonwealth that over 42% of its purchases be made from small businesses. All potential offerors are required to return this document with their response.

Small Business: "Small business (including micro)" means a business which holds a certification as such by the Virginia Department of Small Business and Supplier Diversity (DSBSD) on the due date for proposals. This shall also include DSBSD-certified women- owned and minority-owned businesses and businesses with DSBSD service disabled veteran owned status when they also hold a DSBSD certification as a small business on the proposal due date. Currently, DSBSD offers small business certification and micro business designation to firms that qualify.

Certification applications are available through DSBSD online at www.SBSD.virginia.gov (Customer Service).

Offeror Name: _____

Preparer Name: _____ **Date:** _____

Who will be doing the work: I plan to use subcontractors I plan to complete all work

Instructions:

- A. If you are certified by the DSBSD as a micro/small business, complete only Section A of this form.
- B. If you are not a DSBSD-certified small business, complete Section B of this form. For the offeror to receive credit for the small business subcontracting plan evaluation criteria, the offeror shall identify the portions of the contract that will be subcontracted to DSBSD-certified small business for the initial contract period the initial contract period in Section B.

Offerors which are small businesses themselves will receive the maximum available points for the small business participation plan evaluation criterion, and do not have any further subcontracting requirements.

Offerors which are not certified small businesses will be assigned points based on proposed expenditures with DSBSD-certified small businesses for the initial contract period in relation to the offeror's total price for the initial contract period.

Points will be assigned based on each offeror's proposed subcontracting expenditures with DSBSD-certified small businesses for the initial contract period as indicated in Section B in relation to the offeror's total price.

Section A

If your firm is certified by the DSBSD provide your certification number and the date of certification.

Certification number: _____ Certification Date: _____

RETURN OF THIS PAGE IS REQUIRED (Tab 5)

ATTACHMENT C

Section B

If the "I plan to use subcontractors" box is checked, populate the requested information below, per subcontractor to show your firm's plans for utilization of DSBSD-certified small businesses in the performance of this contract for the initial contract period in relation to the offeror's total price for the initial contract period. Certified small businesses include but are not limited to DSBSD-certified women-owned and minority-owned businesses and businesses with DSBSD service-disabled veteran-owned status that have also received the DSBSD small business certification. Include plans to utilize small businesses as part of joint ventures, partnerships, subcontractors, suppliers, etc. It is important to note that this proposed participation will be incorporated into the subsequent contract and will be a requirement of the contract. Failure to obtain the proposed participation dollar value or percentages may result in breach of the contract.

B. Plans for Utilization of DSBSD-Certified Small Businesses for this Procurement

Subcontract #1

Company Name: _____ SBSD Cert #: _____

Contact Name: _____ SBSD Certification: _____

Contact Phone: _____ Contact Email: _____

Value % or \$ (Initial Term): _____ Contact Address: _____

Description of Work: _____

Subcontract #2

Company Name: _____ SBSD Cert #: _____

Contact Name: _____ SBSD Certification: _____

Contact Phone: _____ Contact Email: _____

Value % or \$ (Initial Term): _____ Contact Address: _____

Description of Work: _____

Subcontract #3

Company Name: _____ SBSD Cert #: _____

Contact Name: _____ SBSD Certification: _____

Contact Phone: _____ Contact Email: _____

Value % or \$ (Initial Term): _____ Contact Address: _____

Description of Work: _____

Subcontract #4

Company Name: _____ SBSD Cert #: _____

Contact Name: _____ SBSD Certification: _____

Contact Phone: _____ Contact Email: _____

Value % or \$ (Initial Term): _____ Contact Address: _____

Description of Work: _____

NOTE: This information can be captured using this template or using the sourcing tools available in eVA.

RETURN OF THIS PAGE IS REQUIRED (Tab 5)

ATTACHMENT D

State Corporation Commission Form

Virginia State Corporation Commission (SCC) registration information.

The Offeror:

is a corporation or other business entity with the following SCC identification number: _____ **-OR-**

is not a corporation, limited liability company, limited partnership, registered limited liability partnership, or business trust **-OR-**

is an out-of-state business entity that does not regularly and continuously maintain as part of its ordinary and customary business any employees, agents, offices, facilities, or inventories in Virginia (not counting any employees or agents in Virginia who merely solicit orders that require acceptance outside Virginia before they become contracts, and not counting any incidental presence of the Offeror in Virginia that is needed in order to assemble, maintain, and repair goods in accordance with the contracts by which such goods were sold and shipped into Virginia from Offeror's out-of-state location) **-OR-**

is an out-of-state business entity that is including with this proposal an opinion of legal counsel which accurately and completely discloses the undersigned Offeror's current contacts with Virginia and describes why those contacts do not constitute the transaction of business in Virginia within the meaning of § 13.1-757 or other similar provisions in Titles 13.1 or 50 of the *Code of Virginia*.

****NOTE**** >> Check the following box if you have not completed any of the foregoing options but currently have pending before the SCC an application for authority to transact business in the Commonwealth of Virginia and wish to be considered for a waiver to allow you to submit the SCC identification number after the due date for proposals (the Commonwealth reserves the right to determine in its sole discretion whether to allow such waiver):

RETURN OF THIS PAGE IS REQUIRED (Tab 6)

ATTACHMENT E:

Proposed Pricing Allocation

Staffing and Management Fee: \$_____ (annual)

Provide a list of position titles and percent of time that will be allocated to VSB Marketing Services.

Marketing Budget

As an attachment provide an itemized list of your firm's proposed pricing allocation (i.e. Marketing Budget) based on your proposal plan and approach to providing the requested services. The hypothetical budget amount of \$900,000 for the initial contract period (February 1, 2023 through June 30, 2024) should be used as a basis for your proposed budget.

RETURN OF THIS PAGE IS REQUIRED (Tab 7)

ATTACHMENT F:

EXCEPTIONS

Complete the following. Check one option only.

_____ Firm does not take any exceptions to the Statement of Needs, General Terms and Conditions, or Special Terms and Conditions.

OR

_____ Firm takes the following exception(s): (include page and section number and description of exception).

RETURN OF THIS PAGE IS REQUIRED (Tab 8)